Greetings Placer County Workday Users!

We are excited to announce the newest version of Workday, version 2021 R1, will be live on March 13th!

To find out more, please visit the Workday Help website to watch a short video regarding the new release and feature changes you can expect. Click here to watch the video.

As a reminder, Workday is a Software as a Service (SaaS) product, and as such, provides users both required and optional system updates semi-annually. Required updates are configured, integrated into existing functionality, and tested by the Workday Support Organization and Business Process Owners prior to release. Optional updates are reviewed with Business Process Owners to decide whether implementation is warranted. The purpose of this communication is to inform users of changes with the March 13th implementation of Workday 2021 R1.

Most users will experience various look and feel changes that will not impact functionality. New fields may appear. If they are required for the business process they will be marked as such. Otherwise, these new fields can be utilized to provide more detail but will not be a system requirement for completion of the business process to which they are associated. Below you will find a summary of the most impactful changes grouped by functional area and attached you will find the master list of all changes to expect with the release of Workday 2021 R1.

In conjunction with the release of Workday 2021 R1, all WalkMe Smart Walk-Thrus and SmartTips will be updated. We encourage users to utilize these tools to familiarize yourselves with new features or existing features that may have moved within Workday. In addition, updated Financial job aids will be available **here** and HCM, Employee Self Service, and Time Tracking job aids can be accessed **here**.

If you have questions, we are happy to help! Please contact us via phone at (530) 889-4199 or via email at workdayhelp@placer.ca.gov.

New features include but are not limited to the following:

Customer Accounts

- Print and Schedule Customer Statements
  - Workday continues to enhance the ability to print customer statements by now enabling you to exclude statements that have both zero balance and no account activity, providing you increased flexibility via the new Balance And Activity Options prompt. Located in the Statement Creation Options section on Print Customer Statements, Print Customer Statements for Sponsors, and schedule Print Customer Statements, this new feature will save you time and effort while increasing your efficiency.

- Include Adjustments in Consolidated Invoices
  - With WD2021r1 you can now include unpaid invoice adjustments when you create, schedule, or print consolidated invoices, improving accuracy and greater insight into your transactions. Available adjustment options include Debit/Credit invoice adjustments and invoices with a negative amount.

- Customer Account Reports
  - In preparation for retirement, Workday appends *Do Not Use* to the name of the Find Customers and Find Customer Invoices reports. Retirement of a report occurs when Workday feels they have alternative reports available to suit a user's needs and will recommend that we do not use the reports going into retirement so that we aren't reliant on their data output. We recommend using the Placer FIN Find Customers and the Find Customer Invoices for Company report respectively that will deliver similar data the soon to be retired reports previously offered.

Enterprise Interface Builder (EIB)

- Journals EIB
  - Placer Import Accounting Journal 2021r1 EIB has been created to allow for inclusion of employee ID to be used as a worktag on journal transactions submitted via EIB. This new EIB will be available here, on the Workday Help website, on March 13th and will replace the previous Journal EIB, Placer Import Accounting Journal 2020r1, which will remain available until March 20th to give you the opportunity to prepare for the change. In addition to the employee ID, new columns were added for Supplier ID, Deduction Code, Purchase Item, and Bank Account.

- Supplier Invoice EIB
  - Placer Submit Supplier Invoice 2021r1 EIB has been created to allow you to link payments to the contract line and split line payments for suppliers invoices via an EIB. This new EIB will be available here, on the Workday Help website, on March 13th and will replace the previous Supplier Invoice EIB, Submit_Supplier_Invoice-NEW, which will remain available until April 13th to give you the opportunity to prepare for the change.

Procurement

- End-to-End Statuses on Purchase Orders
  - Visibility with purchase orders just got better with WD2021r1 with statuses for related documents now readily available in the purchase order header helping you with quickly answering questions and addressing issues for shipments, receipts, and invoices, improving the buying experience. Headers will now display statuses that help you identify purchase orders that are accepted, fully invoiced or paid, fully received, partially acknowledged, partially invoiced or paid, partially received, or rejected.

Projects

- Improved Maintenance of Large Project Volumes
  - Workday 2021r1 updates the Edit and View Project Hierarchy task and report by adding a new Projects tab displaying the projects associated with the project hierarchy and removing them from the project hierarchy view. The modification will improve the performance of the task and report and allow you to manage project hierarchies without waiting for all projects to load.

Time Tracking

- Time Entry Calendar (aka Timesheet) Redesign
  - With the redesign of the Time Entry Calendar, Workday makes time entry and time entry submission more efficient by more clearly labeling buttons, reducing confusion on where and how to take action, and making it easier to navigate to specific weeks, view totals, and submit time. To improve the usability of the timesheet, Workday has added a date picker to more quickly navigate to weeks in different months, replaced the Enter Time button with an Actions button and the Submit button with a Review button to more accurately reflect what users are attempting to accomplish, and moving the summary totals from the top of the screen to the right of the screen to increase visibility.

- Review Time Report Filters
  - New granular filters now available on the Review Time report include, All Workers, Workers with No Time Entered, Workers with Time Ready for Approval, and Workers with Unsubmitted Time, helping approvers to quickly identify time entry exceptions that require follow-up and to approve time entries in bulk when they are ready.

User Experience

- Report Tables
  - Supported tables in Workday now offer a new tables view, allowing you to collapse or expand table rows that contain multiple lines of data and adds page numbers to tables reducing the amount of data, improving accessibility, performance, and usability. Easily turned off and on from the top of the table, the selected choice will remain on all supported tables until you turn the feature off.

- Mini Conclusions
  - When you completed a task in a business process previous to Workday 2021r1 a conclusion displayed, such as *Up Next, You have submitted*, or *Success! Event Approved*, that informed you what was happening next with the business process. You will now receive a condensed version of the full conclusion in a pop-up mini conclusion, allowing for increased visibility and improved navigation.
  - Ding Dong the Done button is gone! With the introduction of Mini Conclusions, no more pesky Done button at the end of your Business Processes or Inbox items, improving process efficiency.

- User Interface Display
  - Workday 2021r1 improves your user experience, making it easier for you to select, view, enter, and export data in Workday with the enhancement of headers across Workday. With the changes, you will experience newly aligned and spaced headers and sub-headers, enhanced Print and Excel icons, and replacement of the Action button on the header with a related actions icon, improving the visual experience. Be aware that the old Print icon has been replaced with a PDF icon. The functionality is similar, but the new button more accurately reflects what you will experience when printing from Workday.

Feature	Feature Description	Functional Area(s)	New Functionality Title	New Functionality
850 EDI Standards	We continue to enhance the 850 EDI integration so that you and your suppliers can easily and effectively communicate using the integration, without workarounds. This helps you ensure your EDI communications are up to standard, saving you time.	Integration Procurement	Delimiters on Outbound 850	We now trim these ASC X12 supported delimiters from outbound EDI 850 transactions to prevent issues when suppliers process your documents: tildes, carets, colons, asterisks, and vertical line symbols. Example: 123~ABC for Supplier Aux ID processes as 123ABC.
Accessibility	With 2021R1, we continue to enhance accessibility across the user interface, helping assistive technology users navigate Workday.	User Experience	Accessibility for Guided Experience Editor	Workday now displays an accessible pop-up to inform users when their changes are saved on sections they edit on the Guided Experience editor.

				Note: We only support this feature for tasks configured to use the Guided Experience feature.
Aggregate FLSA Adjustments on Payslips	Workday 2021R1 delivers a new configuration option that enables you to aggregate FLSA earnings on payslips, providing more flexibility and clarity.	Core Payroll	Maintain Payroll Payslip Configuration	We add a new Aggregate FLSA Adjustments prompt in the Printing tab on the Maintain Payroll Payslip Configuration task. When you select the relevant FLSA earnings from the prompt, Workday combines the identical FLSA earnings lines based on the pay component, pay period, and hours. We then display the aggregated rate and amount on the payslip. Note: This functionality only applies to U.S payroll payslip configuration.
Aggregate FLSA Adjustments on Payslips	Workday 2021R1 delivers a new configuration option that enables you to aggregate FLSA earnings on payslips, providing more flexibility and clarity.	Core Payroll Integration	FLSA Earnings on Integrations	We update these integration templates, ensuring that Workday summarizes FLSA earnings on the integration output: • ADP Check Print (Enhanced Performance) • ADP Check Print Template (DO NOT USE) • Core Connector: Payroll Check Printing (Enhanced Performance) • Core Connector: Payroll Check Printing Connector (DO NOT USE) • WPN - Ceridian Check Printing
Aggregate FLSA Adjustments on Payslips	Workday 2021R1 delivers a new configuration option that enables you to aggregate FLSA earnings on payslips, providing more flexibility and clarity.	Core Payroll	Payslip and Payment Web Services	We update these web services to support the new Aggregate FLSA Adjustments prompt on the Maintain Payroll Payslip Configuration task: • Get Payroll Payslips • Get Payments
Asset Cost Reporting	Workday improves asset cost reporting to save you time and manual effort. We now include taxes for partially received assets and enable you to view the supplier invoice line that allocates the cost of an asset.	Business Asset Accounting Business Asset Tracking	Assign Asset Accounting Information	Workday improves the Assign Asset Accounting Information Inbox task by now: • Always allocating tax and freight for partially received and invoiced assets. • No longer enabling you to edit the Cost field after accounting is submitted, ensuring approvers see the same cost. • Populating the invoice line when the invoice document has enough quantity. • Populating the supplier invoice line for asset allocation in the Supplier Invoice Line prompt. • Using the landed cost from a linked invoice, even when the asset is created from a receipt.

Asset Cost Reporting	Workday improves asset cost reporting to save you time and manual effort. We now include taxes for partially received assets and enable you to view the supplier invoice line that allocates the cost of an asset.	Business Asset Accounting Business Asset Tracking	Register Assets	Workday now creates a single pooled asset from multiple assets on the same service line when you register assets on the: • Register Assets task. • Register Asset web service. • Register Business Asset Inbox task.
Asset Cost Reporting	Workday improves asset cost reporting to save you time and manual effort. We now include taxes for partially received assets and enable you to view the supplier invoice line that allocates the cost of an asset.	Business Asset Accounting Business Asset Tracking	Supplier Invoice Document Field	On the Register Assets task, we remove the Supplier Invoice Document field and instead add a new Supplier Invoice Line field. This provides you with more granular visibility into invoice lines that allocate cost to assets.
Asset Cost Reporting	Workday improves asset cost reporting to save you time and manual effort. We now include taxes for partially received assets and enable you to view the supplier invoice line that allocates the cost of an asset.	Business Asset Accounting Business Asset Tracking	View Business Asset Report	For clarity, we rename the Source column in the Cost Detail tab on the View Business Asset report to Cost Source.
Asset Cost Reporting	Workday improves asset cost reporting to save you time and manual effort. We now include taxes for partially received assets and enable you to view the supplier invoice line that allocates the cost of an asset.	Business Asset Accounting Business Asset Tracking	View Supplier Invoice Report	On the View Supplier Invoice report, we now only display assets that have cost assigned or are directly created from an invoice.
Attachments on Supplier Contracts	You can now add attachments to supplier contracts without creating amendments. This eliminates new contract versions when you don't update the contract terms and agreements.	Procurement Supplier Contracts	Add Attachments to Supplier Contracts without Amendments	Workday delivers a new Add Attachment task (secured to the new Process: Suppler Contract - Add Attachment domain), which you can access from the related actions menu of supplier contracts in these statuses: • Approved • Canceled • Closed The task enables your users to add or remove attachments without unnecessarily creating an amendment for the supplier contract and another version number.

Budgets Reporting	We continue to improve reporting for budgets by delivering new reports for each plan type.	Budgets	Manager Financial Budgetary Balance Reports	We deliver a new Manager Financial Budgetary Balance composite report (secured to the Report Execution domain) that includes a new Manager Financial Budgetary Balance Plan Sub-Report (secured to the Reports: Manager Financial Budgets domain). The new composite report also includes these new reports (secured to the Reports: Manager Financial Budgets and Reports: Organization Financial Reporting domains): • Manager Financial Budgetary Balance Actuals Sub-Report • Manager Financial Budgetary Balance Commitment Sub-Report • Manager Financial Budgetary Balance Obligation Sub-Report You can copy the new reports to create custom reports.
Budgets Reporting	We continue to improve reporting for budgets by delivering new reports for each plan type.	Budgets	Financial Budgetary Balance Reports	We deliver a new Financial Budgetary Balance composite report (secured to the Report Execution domain), which includes a new Financial Budgetary Balance Plan Sub-Report report (secured to the Reports: Company Financial Budgets domain). The new composite report also includes these new reports (secured to the Reports: Company Financial Budgets and Reports: Financial Accounting domains): • Financial Budgetary Balance Actuals Sub-Report • Financial Budgetary Balance Commitment Sub-Report • Financial Budgetary Balance Obligation Sub-Report You can copy the new reports to create custom reports.
Budgets Reporting	We continue to improve reporting for budgets by delivering new reports for each plan type.	Budgets	Manager Financial Budgetary Balance Prompt Set	We deliver a new Manager Financial Budgetary Balance Prompt Set that you can use when you copy the new Manager Financial Budgetary Balance composite report to create a custom report.
Budgets Reporting	We continue to improve reporting for budgets by delivering new reports for each plan type.	Budgets	Financial Budgetary Balance Prompt Set	We deliver a new Financial Budgetary Balance Prompt Set that you can use when you copy the new Financial Budgetary Balance composite report to create a custom report.

Business Assets - Miscellaneous Enhancements		Business Asset Accounting Business Asset Tracking	Edit Asset	We now enable you to update the Memo field after registering an asset by selecting Business Asset > Edit from the related actions menu of an asset.
Companies on Allocation Offsets	To improve the performance of the monthly allocations process, we now enable you to select a user-specified company on allocation definitions. This reduces the number of intercompany journal lines that you produce and eliminates the need to maintain multistep intercompany allocations. This also helps to reduce the number of allocation definitions that you need to maintain and run each period.	Common Financial Management Financial Accounting	Allocation Definition Web Services	Workday updates these web services to support user-specified companies for offsets that have the same currency, account set, and fiscal schedule as the source company: • Get Allocation Definitions • Put Allocation Definition
Companies on Allocation Offsets	To improve the performance of the monthly allocations process, we now enable you to select a user-specified company on allocation definitions. This reduces the number of intercompany journal lines that you produce and eliminates the need to maintain multistep intercompany allocations. This also helps to reduce the number of allocation definitions that you need to maintain and run each period.	Common Financial Management Financial Accounting	Select User-Specified Companies for Offsets	We deliver these new prompts in the Offset section on the Create Allocation Definition task: • Company • Company is From You can use the new prompts to select a user-specified company for the offset that has the same currency, account set, and fiscal schedule as the source company. Note: To use the Company prompt, you must select the User Specified option in the Company is From prompt. Also, to maintain data integrity when you set up dependent allocations that include user-specified companies for offsets, we recommend that you: • Include all user-specified companies and allocation group sets that you're finalizing. • Review results in the Allocations Available for Finalization grid on the allocation definition.

Companies on Allocation Offsets	To improve the performance of the monthly allocations process, we now enable you to select a user-specified company on allocation definitions. This reduces the number of intercompany journal lines that you produce and eliminates the need to maintain multistep intercompany allocations. This also helps to reduce the number of allocation definitions that you need to maintain and run each period.	Common Financial Management Financial Accounting	Company Column for Offsets on Allocation Results	We deliver a new Company column on the Offset tab on your allocation results, enabling you to view the source or user-specified companies associated with the offset.
Companies on Allocation Offsets	To improve the performance of the monthly allocations process, we now enable you to select a user-specified company on allocation definitions. This reduces the number of intercompany journal lines that you produce and eliminates the need to maintain multistep intercompany allocations. This also helps to reduce the number of allocation definitions that you need to maintain and run each period.	Common Financial Management Financial Accounting	Allocation Report Fields	We deliver these new report fields on the Allocation business object (secured to the Public Reporting Items domain) that you can use in custom reports to display the source or user-specified companies and ledger periods for the offset from the allocation result: • Source Company • Source Ledger Period
Correct Supervisory Organization on Hire	Workday enables you to correct the supervisory organization on the Hire business process, reducing manual effort.	Staffing	Correct Supervisory Organization	We now enable you to correct the supervisory organization on the Hire business process. Notes: • You can only submit a supervisory organization change when the organization you want to change to uses the same staffing model. • For the position management staffing model, until the hire date is effective, the worker's last supervisory organization displays on their position restriction, which displays on their last supervisory organization. • You can only make the correction on a completed hire.

Correct Supervisory Organization on Hire	Workday enables you to correct the supervisory organization on the Hire business process, reducing manual effort.	Staffing	Reassign Inbox Items After Correcting Supervisory Organization	We deliver a new Inbox Items to Reassign After Correcting Supervisory Organization on Hire report, secured to the Business Process Administration domain. When you correct a worker's supervisory organization, the report can help you identify all Inbox items that are subprocesses of the Hire business process that are awaiting action and need to be reassigned. You can copy this report to use with the Mass Operation Management task so that you can automatically reassign the items.
Correct Supervisory Organization on Hire	Workday enables you to correct the supervisory organization on the Hire business process, reducing manual effort.	Staffing	Organization Field Rename	For clarity and consistency, we rename the Organization field to Supervisory Organization on the: • Details tab on a Hire event. • Job Details section when you correct the Hire business process. • Job Details report that you access on a worker profile. • View Worker History by Category report.
Custom Reporting for Receivables Aging	With 2021R1, we enable you to create custom aging reports that you can configure to better suit your business needs, giving you more insight into your receivables data.	Customer Accounts	Receivables Aging Report Fields	With this update, we deliver these new report fields on the Customer Invoice Document business object (secured to Public Reporting Items domain): • Aging Days As Of Reporting Date By Invoice Or Due Date • Original Transaction Amount For Receivables Aging • Transaction Balance In Company Currency As Of Reporting Date For Receivables Aging • Transaction Balance In Reporting Currency As Of Reporting Date For Receivables Aging • Transaction Balance In Transaction Currency As Of Reporting Date For Receivables Aging You can use the new report fields to create a composite report or in custom reports to: • Create a calculated field that displays the aging groups to use in a sub-matrix report. • View the details of your open receivables in 1 currency at a line level.
Customer Accounts - Miscellaneous Enhancements		Customer Accounts Project Billing	Find Customer Invoices	Workday appends (Do Not Use) to the name of the Find Customer Invoices reports in preparation for it's retirement in a future update. We recommend that you use the Find Customer Invoices for Company report instead as it provides improved performance.

Customer Accounts - Miscellaneous Enhancements		Customer Accounts Customers	Customers Reporting Items	In preparation for retirement, we append (Do Not Use) to the name of the Customers report data source (RDS). We recommend that you use the Indexed Customers RDS instead. Workday also appends (Do Not Use) to the name of the Find Customers report in preparation for its retirement in a future update. We recommend that you use the indexed Find Customers with Facet Search report instead since it provides improved performance.
Customize Enrollment Instructions for Coverage Types	Workday enables you to customize enrollment instructions for each coverage type, helping you to provide more specific information for your workers.	Benefits	Enrollment Instructions by Benefit Coverage Type	With this update, Workday adds a new Benefit Coverage Type column in the Benefit Group Instructions grid on the Maintain Benefit Enrollment Instructions task. You can use the column to select a coverage type for a set of customized instructions. This feature isn't available for the Workday 32 enrollment workflow. You can also select a combination of coverage types, benefit groups, and event types to specify where instructions appear. Workday recommends that you select all of the options that you want to display in each column.
Customize Enrollment Instructions for Coverage Types	Workday enables you to customize enrollment instructions for each coverage type, helping you to provide more specific information for your workers.	Benefits	Benefit Coverage Type Report Field	We add the Benefit Coverage Type report field on the Enrollment Instruction Abstract business object (secured to the Set Up: Benefits domain) that you can use in custom reports and condition rules.

Decimal Precision on Currency Exchange Rates	We increase the number of displayed decimal places on currency exchange rates, enabling you to more precisely represent very small currency exchange ratios.	Banking and Settlement Budgets Cash Management Common Financial Management Core Compensation Core Payroll Customer Accounts Expenses Financial Accounting Inventory Planning Procurement Projects Student Financials Supplier Accounts	Decimal Precision	We increase the number of decimal places from 6 to 12 on all currency exchange rates in Workday, enabling you to record currency exchange rates with up to 24 digits total. Workday truncates the exchange rate to 18 digits when displaying the new rate. Note: To maintain data integrity, when you use a custom validation to verify that a currency exchange rate from a report field exactly matches a calculated currency exchange rate, we recommend that you update your validation with a custom validation that: • Multiplies both currency exchange rates by 10^6, or • Uses a calculated field to compare a currency exchange rate from a report field with a calculated currency exchange rate.
Discrete Composite Assets	Workday now enables you to manage discrete composite assets, helping you ensure that the assets reflect the current components. We also improve	Business Asset Accounting Business	Add and Remove Asset Components	Workday now enables you to add or remove asset components on the Edit Asset task, which you can access from the related actions menu on an asset. This helps you manage discrete composite assets.

	how you report on business assets, making it easier to find specific asset components.	Asset Tracking		
Discrete Composite Assets	Workday now enables you to manage discrete composite assets, helping you ensure that the assets reflect the current components. We also improve how you report on business assets, making it easier to find specific asset components.	Business Asset Accounting Business Asset Tracking	Remove Assets	You can now remove a discrete composite asset after removing all its component assets on the Remove Asset task.
Discrete Composite Assets	Workday now enables you to manage discrete composite assets, helping you ensure that the assets reflect the current components. We also improve how you report on business assets, making it easier to find specific asset components.	Business Asset Accounting Business Asset Tracking	Asset Component Columns	Workday adds these new columns to help you find asset components more efficiently: • Asset Identifier • Asset Name • External Contract Number • Item • Manufacturer • Memo • PO Number • Project Number • Receipt Number • Supplier Invoice Number • Supplier Number We also add these new columns to the Components tab on the: • Edit Asset task. • View Business Asset report.
Display Gender Pronouns With Worker Names	With this release, Workday enables your organization and workers to configure gender pronouns to publicly display with the worker's name and job title. This gives workers more control over how they share their personal information with their organizations.	Mobile	Pronoun Display in Worker Profiles in Mobile	We improve the Workday mobile applications by enabling workers to display their pronouns on their worker profiles.

Drive	We continue to improve Workday Drive, enabling you to easily add, manage, and share business content within your organization.	Media and File Storage	Virus Scanning Drive Uploads	With this update, we automatically scan items for viruses when you upload them, enhancing security. Note: We don't enable virus scanning on: • Files imported using APIs and integrations. • Media file (video) uploads.
Drive	We continue to improve Workday Drive, enabling you to easily add, manage, and share business content within your organization.	Media and File Storage Prism Analytics	Drive Items in Global Search	We add Drive as a search category in Workday global search. Search results include all file types that you configure to manage in Drive, such as: • Discovery boards. • Media file (video) uploads. • Worksheets workbooks.
End-to-End Statuses on Purchase Orders	We now provide end-to-end visibility over your orders by displaying statuses for related documents on purchase orders. This helps you quickly answer questions and address issues for shipments, receipts, and invoices, improving the buying experience.	Procurement	Purchase Order Statuses	With this update, we make it easier to identify statuses on purchase orders and purchase order lines. On headers, we now display statuses that help you identify purchase orders that are: • Accepted. • Fully invoiced or paid. • Fully shipped or received. • Partially acknowledged. • Partially invoiced or paid. • Partially shipped or received. • Rejected. On lines and line previews, we now display statuses for lines that are partially or fully: • Invoiced or paid. • Received or shipped.
End-to-End Statuses on Purchase Orders	We now provide end-to-end visibility over your orders by displaying statuses for related documents on purchase orders. This helps you quickly answer questions and address issues for shipments, receipts, and invoices, improving the buying experience.	Procurement	Get Purchase Orders Web Service	We update the Get Purchase Orders web service to now support end-to-end statuses on your purchase orders.

End-to-End Statuses on Purchase Orders	We now provide end-to-end visibility over your orders by displaying statuses for related documents on purchase orders. This helps you quickly answer questions and address issues for shipments, receipts, and invoices, improving the buying experience.	Procurement	Purchase Order Report Fields	We deliver these new report fields on the Purchase Order business object (secured to the Public Reporting Items domain) that you can use in your custom reports to identify the current status of purchase orders: • Invoicing Status • Payment Status • Receiving Status • Shipping Status
End-to-End Statuses on Purchase Orders	We now provide end-to-end visibility over your orders by displaying statuses for related documents on purchase orders. This helps you quickly answer questions and address issues for shipments, receipts, and invoices, improving the buying experience.	Procurement	Abstract Spend Line Report Fields	We deliver these new report fields on the Abstract Spend Line business object (secured to the Public Reporting Items domain) that you can use in your custom reports to identify the current status of purchase order lines: • Line Invoicing Status • Line Payment Status • Line Receiving Status
End-to-End Statuses on Purchase Orders	We now provide end-to-end visibility over your orders by displaying statuses for related documents on purchase orders. This helps you quickly answer questions and address issues for shipments, receipts, and invoices, improving the buying experience.	Procurement	Goods Order Line Report Field	We deliver a new Line Shipping Status report field on the Goods Order Line business object (secured to the Public Reporting Items domain) that you can use to identify whether the contents on purchase order lines are fully shipped.
Enterprise Interface Builder	With this release, we continue to enhance the performance and usability of Enterprise Interface Builder (EIB).	Integration	Outbound EIB Performance and Resources	With this update, we improve performance for Outbound EIBs configured with CSV output format. We also streamline your tenant reporting resources for integrations. Now, when an Outbound EIB launches a custom report in CSV format that uses excessive reporting resources, Workday: • Aborts the custom report and EIB. • Displays an error message.
Exclude Grants from Reprocessing Award Costs	Workday now enables you to exclude specific grants when you reprocess award costs. This helps you eliminate reconciled or closed grants from award costs reprocessing, improving the accuracy of the calculations.	Grants Management	Grants Web Services	We update these web services to enable you to exclude a grant from award costs reprocessing: • Get Grants • Put Grant

Exclude Grants from Reprocessing Award Costs	Workday now enables you to exclude specific grants when you reprocess award costs. This helps you eliminate reconciled or closed grants from award costs reprocessing, improving the accuracy of the calculations.	Grants Management	Reprocess Check Boxes	We introduce these new check boxes on the Edit Grant task, enabling you to exclude a grant from award costs recalculations when you reprocess award costs: • Exempt Grant from Reprocess • Reprocess Award Costs After Budget Date
Exclude Grants from Reprocessing Award Costs	Workday now enables you to exclude specific grants when you reprocess award costs. This helps you eliminate reconciled or closed grants from award costs reprocessing, improving the accuracy of the calculations.	Grants Management	Reprocess Award Costs	We update the Reprocess Award Costs task so that it doesn't recalculate the award costs for grants that you exempt from award costs reprocessing.
Exclude Zero Balance and Empty Customer Statements	Workday continues to enhance the ability to print customer statements by now enabling you to exclude statements that have both zero balance and no account activity, providing you with increased flexibility.	Customer Accounts Grants Management	Print and Schedule Customer Statements	To save you time and effort, Workday delivers a new Balance And Activity Options prompt in the Statement Creation Options section on these tasks: • Print Customer Statements • Print Customer Statements for Sponsors • Schedule Print Customer Statements In the new prompt, you can choose to exclude statements that either have: • No account activity. • No balance. • A zero balance and no account activity. • A zero balance or no account activity. When you use the Open Item statement type, we replace the Exclude No Account Activity option with a new Exclude Zero Balance And Fully Paid Invoices option in the Balance And Activity Options prompt. This enables you to filter out blank statements and retrieve only statements with open items.
Expand Change Job Template Capabilities	Workday continues to enhance the Change Job business process by enabling you to configure condition rules and security groups on Change Job templates to suit your business needs.	Staffing	Change Job Reason	For clarity, we rename the Manager Reason column to Change Job Reason on the Maintain Change Job Templates task.

Expand Change Job Template Capabilities	Workday continues to enhance the Change Job business process by enabling you to configure condition rules and security groups on Change Job templates to suit your business needs.	Staffing	Condition Rules and Security Groups for Change Job Templates	We add these new columns on the Maintain Change Job Templates task that you can use when configuring Change Job templates: • Condition Rules Applied • Security Groups Note: • Condition rules are based on a worker's current position. • Templates display on the Start Job Change task for workers in roles that are secured to 1 of the security groups indicated on the Security Groups column.
Include Adjustments in Consolidated Invoices	With this release, Workday provides improved accuracy and greater insight into your transactions by enabling you to include unpaid invoice adjustments when you create, schedule, or print consolidated invoices.	Customer Accounts	Customer Invoice Web Services	We update these web services to support including invoice adjustments and negative amount invoices in your consolidated invoices: • Get Consolidated Invoices • Get Customer Invoice Adjustments • Put Consolidated Invoice We also update these web services to prevent you from changing or canceling an invoice adjustment once it's part of a consolidated invoice: • Cancel Customer Invoice Adjustment • Submit Customer Invoice Adjustment
Include Adjustments in Consolidated Invoices	With this release, Workday provides improved accuracy and greater insight into your transactions by enabling you to include unpaid invoice adjustments when you create, schedule, or print consolidated invoices.	Customer Accounts	Consolidated Customer Invoice	To provide greater insight in your transaction balances, we now enable you to include these options in your consolidated customer invoice calculations: • Credit invoice adjustments. • Debit invoice adjustments. • Invoices with a negative amount. To support the new options, we deliver a new: • Include Invoice Documents prompt on the Create Consolidated Customer Invoice task. • Include prompt in the Invoice Document Selection Criteria section on the Schedule Create Consolidated Customer Invoice task. We also update the BIRT file to include adjustments in the PDF when you print the consolidated invoice.

Include Adjustments in Consolidated Invoices	With this release, Workday provides improved accuracy and greater insight into your transactions by enabling you to include unpaid invoice adjustments when you create, schedule, or print consolidated invoices.	Customer Accounts	Customer Invoice Reports	We update these reports to support including invoice adjustments in your consolidated invoices: • Customer Activity Detail • Customer Balance Detail • Customer Invoices Requiring Action • Customer Payment Detail • Find Customer Invoices • Find Customer Invoices for Billable Project • Find Customer Invoices for Company • Invoice Follow-up Dates • Outstanding Receivables vs Payments Applied • Payments Applied • Receivables Aging Detail • View Consolidated Invoice • View Customer Invoice Adjustment
Include Adjustments in Consolidated Invoices	With this release, Workday provides improved accuracy and greater insight into your transactions by enabling you to include unpaid invoice adjustments when you create, schedule, or print consolidated invoices.	Customer Accounts	Customer Invoice Documents Report Field	We add a new Customer Invoices report field on these reports: • Consolidated Customer Invoice Printing Report - Report Design • Find Consolidated Invoices for Company We also deliver a new Customer Invoice Documents report field on the Consolidated Invoice business object (secured to the Public Reporting Items domain) that you can use in custom reports. The new report field: • Includes invoice adjustments along with the customer invoices. • Is grouped by the consolidated invoice. We also append (Do Not Use) to the name of the Customer Invoices report field on the Consolidated Invoice object, which we plan to retire in a future update. Instead, we recommend that you use the new Customer Invoice Documents report field.
Integrations	With this release, we continue to enhance the performance and usability of Workday integrations.	Integration	Integration Event Processing Time	We improve the processing time of integration events related to these integration templates, providing greater efficiency for your Workday integration resources: • Core Connector: Worker with the Data Initialization Service integration service enabled. • Payroll Effective Change Interface. • Worker Effective Change Interface. This improvement updates how Workday processes these integrations, so we recommend additional functional regression testing.

Locale Formatting	With this release, we continue to provide you with a more consistent user experience by improving how we display locale formats.	Globalization	Calendar Format	With this update, we display calendars on these tasks and report based on your locale, standardizing date formatting and adhering to the International Component for Unicode for Java (ICU4J) library: • Enter My Time task. • Enter Time for Worker task. • Find Worker Availability task. • Request Time Off task. • View Student Schedule report. We also format calendars based on your locale for other similar tasks that display a timeline or 7-day calendar. On the tasks and report, the calendar now displays these based on your locale: • Date ranges (week, month, and quarter). • Name of the day of the week. • Name of the month.
Maintain Large Volumes of Projects in Project Hierarchies	Workday improves the performance of project hierarchies with a large volume of associated projects. You can now manage your project hierarchies without waiting for all of the projects to load.	Projects User Experience	Edit Project Hierarchy Task	We update the Edit Project Hierarchy task by adding a new Projects tab. On the tab, we display projects associated with the project hierarchy.
Maintain Large Volumes of Projects in Project Hierarchies	Workday improves the performance of project hierarchies with a large volume of associated projects. You can now manage your project hierarchies without waiting for all of the projects to load.	Projects User Experience	View Project Hierarchy Reports	We update the View Project Hierarchy report by adding a new Projects tab. We also move the Projects to Include section to the new tab. To improve the user experience, we also update the project hierarchy preview by no longer displaying the projects on the hierarchy.
Mini Conclusions	With Workday 2021R1, we make it easier for you to keep context of where you are in Workday. When you complete a task in a business process that displays a conclusion when the process is finished, Workday displays a condensed version of the full conclusion.	User Experience	Mini Conclusions	With Workday 2021R1, we make it easier for you to keep context of where you are in Workday. When you complete a task in a business process that displays a conclusion when the process finishes, Workday displays a condensed version of the full conclusion.
My Shortcuts	With Workday 2021R1, we make security easier to	User Experience	Configure Shortcuts by Admin	We deliver a new Configure Shortcuts by Admin task (secured to the new Self Service: Quick Access

	configure on the My Shortcuts task.			Shortcuts domain), enabling you to better control access to shortcut content.
Phone Number	We continue to enhance phone number functionality to simplify number entry, improve usability, and ensure the consistency of phone data in Workday.	Contact Information	Google Libphonenumber Library Upgrade to v8.12.16	We upgrade the Google libphonenumber library to version v8.12.16, enabling Workday to validate and format phone numbers to meet current global requirements. For details, see the libphonenumber library release notes: https://github.com/google/libphonenumber/blob/master/release_notes.txt.
Review Time Filters	We enable time approvers to review time entry with more granular filters, helping approvers to quickly identify time entry exceptions that require follow-up and to approve time entries in bulk when they're ready.	Time Tracking	Review Time Report Filters	We add these new filters in the Review Time report: • All Workers • Workers with No Time Entered • Workers with Time Ready for Approval • Workers with Unmatched Time • Workers with Unsubmitted Time We also remove these worker totals from the report: • With Hours to Approve • With Unsubmitted Hours
Search for Positions, Pre-Hires, and Position Restrictions	Workday improves performance as you search for pre-hires, positions, and position restrictions in global search and prompts, helping you save time. The search experience now runs faster, eliminating timeouts.	Staffing User Experience	Contingent Worker ID Search Attribute	Workday makes it easier to find contingent workers by enabling you to search by the Contingent Worker ID attribute in worker prompts.
Search for Positions, Pre-Hires, and Position Restrictions	Workday improves performance as you search for pre-hires, positions, and position restrictions in global search and prompts, helping you save time. The search experience now runs faster, eliminating timeouts.	Staffing User Experience	Pre-Hire, Position, and Restriction Search Security	We update the security for users searching for pre-hires, positions, and position restrictions by current legal name. Users must have access to the Search: Current Legal and All Historical Names domain to perform a search.
Simplified SAML Setup	Workday improves the user experience for setting up SAML authentication, saving you time as you configure SAML and helping to reduce configuration errors.	Authentication	Import Identity Provider Configuration	We provide a new Import Identity Provider button on the Edit Tenant Setup - Security task that enables Workday to extract information from an XML file you download from an IdP. Workday then uses the information it extracts to populate a new IdP configuration. Workday can also extract information

				from an XML file and update an existing IdP configuration.
Table-Viewing Options	With this release, we improve accessibility, performance, and usability by adding new viewing options on supported read-only tables across Workday. We now add new configuration options and greater compatibility with assistive technologies. The new table-viewing options enable you to expand and collapse table cells and display page numbers on tables, improving your user experience and simplifying how you navigate Workday.	User Experience	Enable or Disable Tables Display Menu	We add a new Turn On The New Tables View switch on supported read-only tables across Workday. You can use the new switch to choose whether tables display in: • Collapse Rows: Enables you to minimize table rows that contain multiple lines of data. You can also re-expand individual table cells in a collapsed row by selecting the expand icon on the selected cell. • Expand Rows: Enables you to expand table rows that contain multiple lines of data. When you use the new switch to control how rows display on a table, your settings persist on all other supported read-only tables across Workday. Enabling the new display options also supports page numbers, which display at the bottom of supported tables.
Table-Viewing Options	With this release, we improve accessibility, performance, and usability by adding new viewing options on supported read-only tables across Workday. We now add new configuration options and greater compatibility with assistive technologies. The new table-viewing options enable you to expand and collapse table cells and display page numbers on tables, improving your user experience and simplifying how you navigate Workday.	User Experience	Pop Up for Display Menu on Tables	With this update, when you access the new Turn On The New Tables View switch for the first time, Workday displays a pop-up highlighting the new feature.
Time Tracking Calendar Redesign	With this release, we make time entry and submission more efficient for your workers by making it easier for workers to navigate to specific weeks, view their totals, and submit their time through a modal instead of a separate page.	Time Off and Leave Time Tracking	Weekly Calendar in Time Tracking Reporting	To improve usability and efficiency, we update the Enter Time for Worker and Enter My Time report by: • Adding a date picker to make it easier to quickly navigate to weeks in different months. • Displaying a new Review button after you add time to the calendar. You can use the button to review and submit time entries in a consolidated group, rather than in separate pages. • Moving the totals from the top of the calendar to a new Summary section.

				• Replacing the Enter Time button with an Actions button that we display above the calendar.
Translations for Organization Names	Workday enhances how you manage and provide translations for your organizations.	Organizations and Roles	Edit Name and Code Related Action	We update the Edit Name / Code related action on the Edit Supervisory Organization Name task, enabling you to more conveniently edit organization names and add translations
Field Indicators for Discovery Boards	We improve discovery board creation by enabling you to select fields optimized for performance.	Reporting and Analytics	Indicators for Optimized Fields	Workday displays new icons and messaging on discovery boards to help guide creators to select fields optimized for different operations. Fields can be optimized for: • Aggregation • Filtering • Grouping Workday displays: • A blue indicator with the field type icon for optimized fields. • Detailed information on the field tooltip indicating which operations it's optimized for. Workday displays the blue indicator for fields in Prism data sources, but doesn't display messages on the field tooltip because all fields in a Prism data source are optimized.